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| **Finalising User Documentation** |
| Review and approve documentation |
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| The final stage: Gather and analyse feedback from users and make the necessary changes to your documentation. Submitting user documentation for approval. |
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| **Joanne McEvoy** |
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# Finalising user documentation

## Review and approve documentation

The final stage is where you get the opportunity to improve your work based on feedback from users. It is a very important part of the documentation process, so it must not be rushed and you must be patient enough to go over your work a number of times to improve it. Before you begin there are some points to remember to ensure a good result.

First, be sure to allow enough time for the review process. Very often the people that need to look at your work and give you feedback are employed to perform important roles in the business. Their main job has to take priority and, although they may wish to give their feedback promptly, it is not always possible. As well as allowing time to obtain feedback, you must allow enough time to revise the user documentation in response to their comments.

Second, make sure that the final stage is completed thoroughly. To do a thorough job you need feedback from a variety of users and to take all their comments into account. It also means that you need to be prepared to go over your work a number of times. However well you have done your preparation, accept that your work may still need a number of revisions.

We will cover the final stages of preparing user documentation, looking at:

* Delivering documentation and asking for feedback
* Gathering and analysing feedback
* Making changes
* Getting final approval

## Delivering documentation for review

In many cases, the people who will provide feedback are the users, or other relevant groups that are nominated by the client. It is important that the user group meets the following criteria if they are to deliver useful and relevant feedback:

* Is the group typical of users as a whole?
* Is the group large enough to give a variety of opinions?
* Is everyone asked able to commit the time?
* Are their managers or supervisors happy to have them involved?

When a user group is selected, you then need to plan the following:

* How the material/content will be distributed to each group member. That is, will the document be distributed by email, or will you arrange an initial meeting to discuss your feedback requirements and submit a paper-based (or CD) version of the documentation at the same time?
* How the feedback will be provided. That is, will it be provided individually from each user or through a series of meetings with the entire group? Or will you prepare an evaluation tool (such as a feedback form) that will ask for feedback on specific areas of the documentation?

## Gathering and using feedback

Once a user group is selected to provide feedback, the next stage is to gather feedback from each user. Feedback is a way to identify whether the user documentation that you have created meets users’ needs, and to refine or improve documentation based on this feedback.

The main issues you need to seek feedback about are:

* Does the user documentation meet users’ needs?
* Is the documentation easy to follow and understand?
* Are users able to quickly and easily locate the information
* Is the form of documentation (for example, online) easily accessible to users?
* How can the user documentation be improved?

## Creating a feedback form

The traditional way to collect feedback is to use a feedback from. This is a standardised form delivered to and filled in by each member of the user group. It is common for feedback forms to be provided online.

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| --- | --- | --- | --- | --- | --- |
|  | **Strongly agree** | **4** | **3** | **2** | **Strongly disagree** |
| 1. The steps to complete a task are easy to follow and understand. |  |  |  |  |  |
| 1. The documentation is supplied in a suitable format. |  |  |  |  |  |
| 1. It is easy to locate the information I need. |  |  |  |  |  |
| 1. The documentation contains sufficient diagrams and illustrations |  |  |  |  |  |

**Example of part of a feedback form**

As the above example shows, feedback forms include short statements that the user can agree or disagree with, together with a scale that indicates the level of agreement or disagreement.

When designing feedback forms, remember the following:

* *Keep it simple.* Make the questions clear and simple so the users can quickly and easily respond and understand the question being asked. Also provide a feedback form that is easily accessible to the user and requires little effort for the user to complete and submit the form.
* *Keep it short.* Users are busy people and they should not be expected to fill in a long form. On the other hand, make sure you provide room for users to expand their answers and provide additional comments.
* *Use a survey*. Users will be far more ready to answer a survey if they are sure it will be used to improve service to them.

### Activity 3.1

Ask the friend/colleague for whom you have created user documentation (or another friend/colleague or your supervisor) to review the documentation. Create a 10 question user feedback form.

## Other methods used to collect feedback

In some cases collecting feedback is a more complicated process. The client may fill in an online feedback form, and the data from that form is processed and stored in a database. The data can then be summarised and queried in the database allowing feedback to be analysed more easily than paper-based methods.

## Distributing feedback

How a feedback form is distributed to users will depend on factors such as, resources, and location of users. Email and internet are the most common ways to distribute forms, but feedback forms are sometimes distributed face-to-face or by internal or external mail. This of course depends on whether the form is paper-based or online.

Although you will need to distribute the form in accordance with your organisation’s procedures and the factors mentioned previously, it is worth considering the advantages of various distribution methods. The sample feedback form is by no means complete. Use it as a thought starter.

## User group meetings

Another method of collecting feedback is face-t-face meeting with the user group. There are several distinct advantages to this approach:

* Feedback is immediate.
* Users can feed their ideas and suggestions of one another, thus identifying other ways to improve the documentation.
* Common themes can be identified immediately. If a user conveys a concern, and the majority of users nod their heads in agreement, then you have identified a required change in the documentation.

On the other hand, there may also be disadvantages to this approach:

* Users may take too much time to explain their ideas or suggestions
* Users may discuss issues that are not relevant or out of your control.

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| Method | Advantages | Disadvantages |
| Email | * Users can respond in their own time * It is personal (sent to the user’s own email address) * Email is reliable, most of the time * Requires little effort for the client to submit the form | * Easy for user to forget to fill in |
| Web | * Use can respond in their own time * Easy to attach to a database to get overall statistics * Requires little effort for the client to submit the form | * Easy for user to forget to fill in * Difficult to create a system to follow up on surveys that are not completed * May seem impersonal, as it is not personally delivered to the client * Need reliable, fast server and internet connections |
| Post (internal or external) | * Users can respond in their own time * It is personal (sent to the user’s own office address) * Mail is reliable, most of the time | * Easy for user to forget to fill in * No automatic follow up * Requires more effort than online methods for client to submit the form |
| Face-to-face | * Personal * Likely to get the form filled in | * User might feel pressured * Have to find an appropriate time |

**Advantages and disadvantages of distribution methods**

### Activity 3.2

Your firm has developed a new warehouse system and the user documentation is now complete. It is time to put together a team to give you some feedback. Who would be best from the following volunteers? (You need only one more person)

1. Joe will use the system only occasionally and his area is quiet at the moment.
2. Silvio will be the main user of the system. His supervisor has given him approval but Silvio seems very busy all the time.
3. Kathy is a manager has a big say in approval for all aspects of the system but she might well never use it.

### Activity 3.3

You have now got a small team to review your documentation for the warehouse system. Brainstorm ways to get useful feedback other than from meetings and checklists. Write down your list of ideas.

## Collecting and analysing feedback

Once the user group has provided feedback, you then need to collect and analyse that feedback. Remember that analysing feedback needs constant and effective communication between you and those who review the work. Good user documentation is the result of a combined effort between those who write it and those who are expected to use it.

If you have submitted a feedback form to each user, then you may need to collect and summarise each response given.

For example, you may need to calculate the average response of the users to identify a common theme or level of agreement/disagreement.

When analysing individual contributions, make sure you fully understand what each person is saying and check with them if you are in doubt. This may seem obvious, but it is really quite common for people to take a comment in a way never intended.

Once you are satisfied that you understand the comments, try to see if there are common themes. Common themes in feedback are one of the most important issues to look for.

For example, the person may have asked in several places ‘What does this mean?’ about a technical term. This might suggest that you need to provide more explanation close to where these are used. If you are using hypertext mark-up language (HTML), a link might be a good way to do this.

The same process can be used to combine individual comments together to get a general picture. Make sure you understand exactly what has been written. For this, continuing communication with the whole team is important. As with individual feedback, examine the feedback for common themes. If a common theme emerges from the feedback of a number of reviewers, this must be regarded as particularly important, especially if it is a suggestion for change or an area for improvement.

### Activity 3.4

When you analyse the feedback form from reviewers, what are you mainly looking for?  
Why?

## Making changes

Some changes are very simple to implement and not at all controversial. For example, correct spelling or grammar is easily confirmed and corrected. In other cases it might not be clear what changes should be made. As you decide what changes to make, remembered the following points:

* Not every comment or suggestion by every reviewer needs to be taken up as a change, but if several reviewers make similar comments then a change is probably needed.
* If you do not follow up on a specific comment or suggestion, it is a good idea to contact the person who made it and explain why their suggestion was not followed up.
* The documentation belongs to current and future users of the system. Their opinion matters more than yours.

As you begin to make the changes:

* It is easy for small mistakes to creep in while you are making changes. Often the original version has been thoroughly checked for issues like spelling and grammar but errors creep into subsequent versions.
* Be careful to identify and save different versions of your documentation accordingly. Most organisations have a version control system (versioning); make sure you know it and use it.

### Activity 3.5

List three important issues to be aware of as you go about making changes to your documentation.

### Activity 3.6

Find a piece of work (preferably written work) that you have recently completed and had corrected by a teacher or instructor. It should be at least 300 words long, preferably longer; the subject is not important. Make any changes or improvements suggested by the teacher or instructor.

## Getting final approval

A proper sign off means that your work has been approved and accepted and the job is complete. If you are working under a contract, it means that your legal responsibility is finished. It is important to identify who has final say and to make sure that this person (or persons) signs of on the documentation. Not getting a proper sign off can cause problems later; for example, if you are working as an external contractor, you may not get paid.

Often you can get the final documentation approved and signed off on the same way that your templates were approved and sighed off. The sign off is not usually the task of the people who provide the feedback, but often the same person who approved the template also approves the actual documentation. The sorts of people who commonly have authority to sign off include:

* Your supervisor
* The client
* An authorised representative of the business (especially if you are preparing software for a third party)

In any case, you need to identify who has the responsibility to give the final approval, contact them and organise for written approval to occur.

Another point to remember is that the person who gives final approval may not personally examine your work in detail. For this reason, it is useful to have some confirmation available from those who have examined it closely.

For example, you might ask the user group to briefly review the changes made to the documentation. This approach has the added advantage of enabling users to take ownership of the final product.

### Activity 3.7

This activity is a role-playing exercise.

You have completed the online user manual, received feedback and made changes. Finally everyone is happy. Select someone to play the role of Ben, who will give final approval. Make the first appointment and explain to Ben how you went about making sure that your user documentation was of a high standard, and made sure it was acceptable to users. Prepare a sign off sheet for Ben to sign approving the user manual.